

BECOME THE MOST VALUED ADVISOR

The Certified Exit Planning Advisor (CEPA®) Credentialing Program

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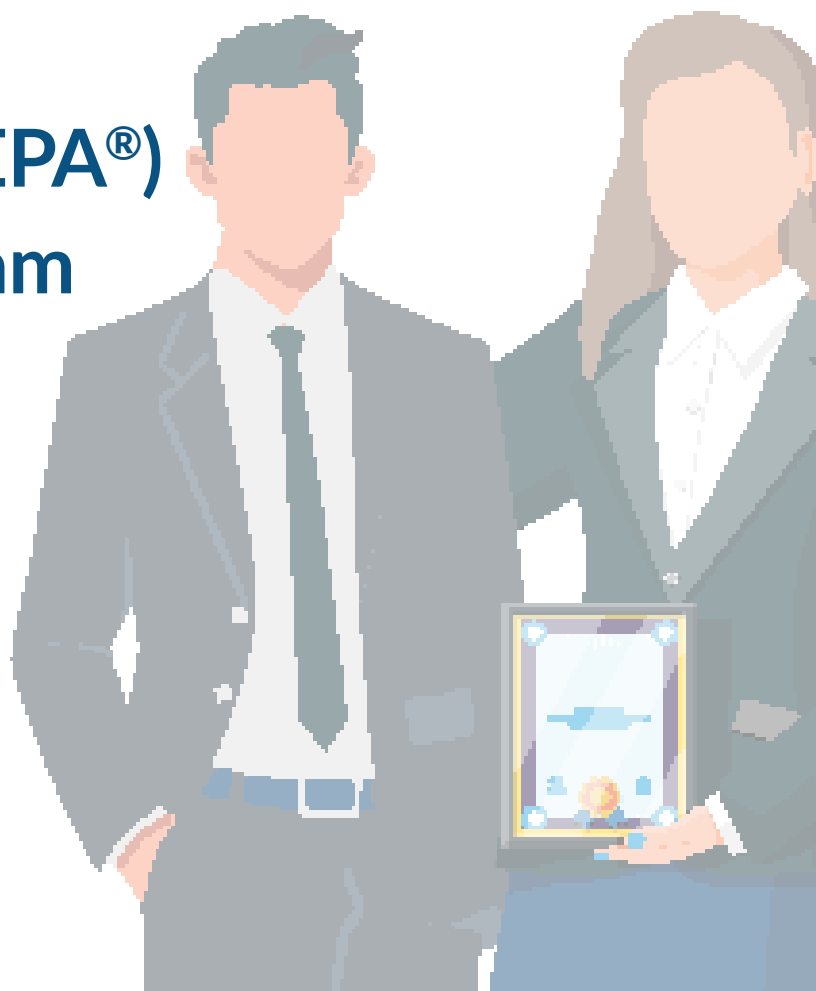
David Goodless, CFA

Associate Portfolio Manager

More than a credentialing
program, *a community.*

The Certified Exit Planning Advisor (CEPA®) credential is for professional advisors who want to effectively engage more business owners. Through the process of Exit Planning (the Value Acceleration Methodology™), owners can build more valuable companies, have stronger personal financial plans, and align their personal goals.

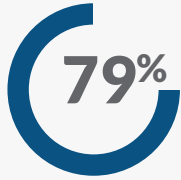
Earning CEPA doesn't change your expertise; it enhances your ability to engage business owners and have value-added conversations around growth and exit.



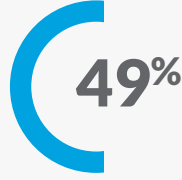
Value of CEPA

- Differentiate yourself from the competition
- Gain better access to business owners
- Become more engaged on a business owner's advisory team
- Have deeper and more holistic conversations with business owners
- Grow your referral network of professional advisors
- Access hundreds of marketing and business development tools tailored for owners

OPPORTUNITIES BY THE NUMBERS



of owners who plan to transition in the next 10 years (representing 4.5 million businesses and over \$10 trillion in wealth) indicated they have no written personal financial plan



have no transition plan



and more of businesses that are put on the market do not sell



of family owned businesses transition to the second generation, and only 12% survive to the third

Source: Exit Planning Institute, as of 2024.

THE AUTHORITY ON EXIT PLANNING

In 2005, the Exit Planning Institute (EPI) was founded in order to educate business advisors on the importance and implementation of exit planning. Since then, EPI standardized that knowledge through the Certified Exit Planning Advisor (CEPA) credentialing program and has over 5,000 active CEPA-certified advisors.

The Exit Planning Institute has educated professional advisors for over 18 years

A community made up of attorneys, wealth managers, CPAs and accountants, business brokers, financial planners, valuation advisors, investment bankers, estate planners, commercial lenders, consultants, insurance professionals, mergers and acquisition advisors.

- Includes a network of exit planning professionals from over 18 countries.
- The CEPA® credential has been recognized by over 40 organizations and institutions nationwide.

Business owners tend to look for liquidity in their practice during times of volatility in their lives, which can be unpredictable. Be prepared to step in as the trusted advisor during those times utilizing the CEPA designation and CNR's Wealth Strategy Team.

CNR's in-house Private Wealth Solutions team utilizes the CEPA credential and can leverage the CEPA principles on your behalf to approach HNW and UHNW clients. Contact your Senior Investment Consultant to learn how.

Program Curriculum

Exit Planning Foundation and Fundamentals

- Exit Planning Reinvented
- Exit Planning Process & the Value Acceleration Methodology Overview
- Financial Planning for Business Owners
- Integrated Tax, Estate and Charitable Planning for Business Owners

Understanding and Managing Value

- Intro to the Triggering Event
- Basics of Business Valuation
- Value Enhancement Process

Engagement, Fulfillment and Rhythm

- Goals and Objectives
- Creating Action Plans
- Delivering Action Plans

External Exit Options

- Exit Options Analysis
- Understanding Private Equity
- Third-Party Sales and the M&A Process

Internal Exit Strategies

- Understanding Family Transitions
- ESOPs as an Exit Strategy
- Importance of Teams

To learn more, contact your Senior Investment Consultant or Portfolio Manager. You can also visit us at www.cnr.com, or email us at citynationalrochdale@cnr.com.

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Certain statements contained herein may constitute projections, forecasts and other forward-looking statements, which do not reflect actual results and are based primarily upon a hypothetical set of assumptions applied to certain historical financial information. Readers are cautioned that such forward-looking statements are not a guarantee of future results, involve risks and uncertainties, and actual results may differ materially from those statement. Certain information has been provided by third-party sources and, although believed to be reliable, it has not been independently verified and its accuracy or completeness cannot be guaranteed. Any opinions, projections, forecasts, and forward-looking statements presented herein are valid as on the date of this document and are subject to change.

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The information presented does not involve the rendering of personalized investment, financial, legal, or tax advice.

As with any investment strategy, there is no guarantee that investment objectives will be met, and investors may lose money.

All investing is subject to risk, including the possible loss of the money you invest. As with any investment strategy, there is no guarantee that investment objectives will be met, and investors may lose money. Diversification does not ensure a profit or protect against a loss in a declining market. Past performance is no guarantee of future performance.

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